填寫本表格前，請先閱讀第 6 頁至第 7 頁的「僱員自選安排」強積金累算權益(權益)轉移指南。**Please read the GUIDE TO TRANSFER OF MPF ACCRUED BENEFITS (BENEFITS) UNDER EMPLOYEE CHOICE ARRANGEMENT (ECA) on pages 6 to 7 before you complete this Form.**

文件編號
Form Code
PP

Sun Life 永明金融

永明彩虹強積金計劃－ 僱員自選安排」- 轉移選擇表格 [第 MPF(S)-P(P)號表格]

SUN LIFE RAINBOW MPF SCHEME – EMPLOYEE CHOICE ARRANGEMENT ("ECA") – TRANSFER ELECTION FORM [FORM MPF(S) -P(P)]

(適用於僱員在現職期間把現職的強積金註冊計劃 (「原計劃」) 供款帳戶內的強積金累算權益 (「權益」) 轉移至自選計劃 (「新計劃」) 的帳戶)

(For an employee to transfer MPF accrued benefits (benefits) from a contribution account in a scheme under current employment ("Original Scheme") to an account in a scheme elected by the employee ("New Scheme") during employment)

《強制性公積金計劃 (一般) 規例》(《規例》) (第 485A 章) 第 148A 及 148B 條

Sections 148A and 148B of the Mandatory Provident Fund Schemes (General) Regulation (Cap 485A)

101083012G

重要事項 Important Notes:

1. 請以正楷填寫本表格。Please use BLOCK LETTERS to complete this Form.
2. 你就此項轉移申請提供的個人資料，將用作處理你的轉移申請。你提供的個人資料可能會為該目的而轉交相關受託人、相關服務提供者，以及政府或規管機構，包括強制性公積金計劃管理局(「積金局」)。The personal data to be supplied of this election of transfer are to be used for processing your election of transfer. The personal data you supply may, for such purpose, be transferred to the trustee(s) concerned, the relevant service provider(s), and the government or regulatory bodies including the Mandatory Provident Fund Schemes Authority ("MPFA").
3. 請就本表格以外之要求，分別向原/新計劃的受託人另行提交通知。Please submit another notice to trustee of Original /New Scheme for any request(s) other than the purpose of this Form separately.

第一部分 SECTION I 計劃成員資料 SCHEME MEMBER DETAILS

(1) 成員姓名[備註 1]
Name of Member[Note1]
(英文 English)

(姓 Surname)

(名 Given Name)

(須與香港身份證[備註 1] / 護照上的相同 must be same as HKID[Note1] / Passport)

成員姓名
Name of Member
(中文 Chinese)

(姓 Surname) (名 Given Name)

(須與香港身份證[備註 1] / 護照上的相同 must be same as HKID[Note1] / Passport)

稱銜
Title

☐ 先生 Mr
☐ 女士 Ms

(2) 身份證明文件
Identity Document

☐ 香港身份證號碼 HKID No.
☐ 護照號碼 Passport No. (護照號碼僅供沒有香港身份證的成員填寫 Passport No. is applicable ONLY for member without HKID Card)

(3) 聯絡資料
Contact details

手提電話號碼
Mobile Number

住宅電話號碼
Home Telephone Number

公司電話號碼
Office Telephone Number

電郵地址
Email address

(4) 通訊地址 Correspondence Address
(如非更改通訊地址，此部份無須填寫。) (You are NOT required to fill in this part unless you intend to update your correspondence address.)

☐ 以上之通訊地址將更新至閣下於永明彩虹強積金計劃之所有成員帳戶。如以上通訊地址只適用於第三部 6(a)或 6(b)列明的成員帳戶，請於方格內填上✓號。
The above correspondence address will be updated for **ALL** your existing member accounts in Sun Life Rainbow MPF Scheme. Please ✓ the box if it will be applied to the member account stated in 6(a) or 6(b) under Section III only.

第二部分 SECTION II 原計劃的供款帳戶資料 CONTRIBUTION ACCOUNT INFORMATION IN ORIGINAL SCHEME

(5) 原計劃名稱[備註 2] (英文)
Name of Original Scheme[Note2] (English)

原計劃名稱[備註 2] (中文)
Name of Original Scheme[Note2] (Chinese)

計劃成員帳戶號碼[備註 2]
Scheme Member Account No.[Note 2]

僱主識別號碼[備註 2,3]
Employer's Identification No.[Note2,3]

第三部分 SECTION III 轉移權益[備註 4] TRANSFER OF BENEFITS[Note4]

請說明你希望把原計劃供款帳戶內哪部份的權益轉移至另一個強積金帳戶。Please indicate the part(s) of benefits in your contribution account of Original Scheme that you wish to transfer out to another MPF account.

(6) 請選擇方案 (a) 或 (b)，並在適當方格內加上✓號 Please select either option (a) **or** (b) and ✓ as appropriate:

☐ **(a) 轉移全部權益 Transfer ALL Benefits**

本人希望將原計劃供款帳戶內管限規則許可的以下全部權益轉移 I wish to transfer **ALL** the benefits comprising the following parts from my contribution account of Original Scheme as its governing rules permit:

- 現職期間的僱員強制性供款[備註 5,6] Employee mandatory contributions in current employment[Note5,6]
- 現職期間的僱員自願性供款[備註 7,8] Employee voluntary contributions in current employment[Note7,8]
- 以往工作所累積並已轉移至供款帳戶的強制性供款[備註 9] Mandatory contributions that have been transferred into the contribution account and are attributable to former employment(s)[Note9]
- 以往工作所累積並已轉移至供款帳戶的自願性供款[備註 8,10] Voluntary contributions that have been transferred into the contribution account and are attributable to former employment(s)[Note8,10]

請把權益轉移至以下個人帳戶 Please transfer the benefits to the following personal account:

新計劃名稱[備註 11] Name of New Scheme[Note11] : 永明彩虹強積金計劃 Sun Life Rainbow MPF Scheme

計劃成員帳戶號碼[備註 11]
Scheme Member Account No.[Note11]

☐ **(b) 轉移部份權益 Transfer Part(s) of Benefits**

本人希望轉移原計劃供款帳戶內管限規則許可的以下部份權益 I wish to transfer the following **part(s)** of the benefits from my contribution account of Original Scheme as its governing rules permit:
(你可選擇轉移以下其中一部分或多個部分，請在適當方格內加上 ✓ 號 you may select one or more parts below and ✓ as appropriate)

由原計劃轉出的權益 **Benefits to be transferred from Original Scheme**	接收權益的帳戶類別 **Type of account receiving the benefits**
☐ 現職期間的僱員強制性供款[備註 5,6] Employee mandatory contributions in current employment[Note5,6] ☐ 現職期間的僱員自願性供款[備註 7,8] Employee voluntary contributions in current employment[Note7,8]	只限個人帳戶
☐ 以往工作所累積並已轉移至供款帳戶的強制性供款[備註 9] Mandatory contributions that have been transferred into the contribution account and are attributable to former employment(s)[Note9] ☐ 以往工作所累積並已轉移至供款帳戶的自願性供款[備註 8,10] Voluntary contributions that have been transferred into the contribution account and are attributable to former employment(s)[Note8,10]	個人帳戶 **或** 供款帳戶

請把上述選擇的權益轉移至以下帳戶 Please transfer the benefits selected above to the following account:

新計劃名稱[備註 11]**Name of New Scheme**[Note11] **：**永明彩虹強積金計劃 Sun Life Rainbow MPF Scheme

帳戶類別[備註 11]**Account Type**[Note11] (只可選一項*，請於適當方格內加上✓號 Select one only* and ✓ as appropriate)

☐ 個人帳戶 Personal Account 或 or ☐ 供款帳戶 Contribution Account

僱主識別號碼[備註 3,11] ☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐

計劃成員帳戶號碼[備註 11]
Scheme Member Account No.[Note11] ☐☐☐☐☐☐☐☐☐☐☐☐

* 如欲把供款帳戶內不同部分的權益轉移至不同的強積金帳戶，請分別就每個將會接收該等權益的強積金帳戶填寫一份第 MPF(S)-P(P)號表格。
* If you wish to transfer different parts of benefits from your contribution account to different MPF accounts, please fill in a separate Form MPF(S)-P(P) for each MPF account that receives the benefits.

第四部分 Section IV 授權及聲明 AUTHORIZATION AND DECLARATION

(7) 本人同意，新計劃的受託人及積金局可為處理本人的轉移申請，向相關受託人及相關服務提供者披露本人就此項轉移申請提供的資料，或使該等機構／人士能夠取覽或披露該等資料。 I hereby give consent to the trustee of New Scheme and the MPFA to disclose information supplied by me in support of this election of transfer to the trustee(s) concerned and the relevant service provider(s), or to enable such party or parties to access or disclose relevant information for processing my election of transfer.

(8) 本人確認及聲明： I confirm and declare that:
- (i) 本人已閱讀及明白註釋及《指南》的內容，並自願選擇按照本表格轉移強權益。 I have read and understood the Explanatory Notes and the Guide, and have voluntarily elected to transfer my benefits in accordance with this Form;
- (ii) 在提交本表格當日，本人受僱於為本人開設原計劃供款帳戶的僱主 at the date of submitting this Form, I am employed by the employer in relation to the contribution account in Original Scheme;
- (iii) 本人確認已收到、閱讀和明白附件《個人資料收集聲明(2018-03 版本)》中的條款及最近期的《強積金計劃說明書》；及 I confirm that I have received, read and understood the terms in the enclosed "Personal Information Collection Statement (Version 2018-03)" and the latest MPF Scheme Brochure; and
- (iv) 盡本人所知所信，本表格所提供的資料正確及詳盡 to the best of my knowledge and belief, the information given in this Form is correct and complete.

(9) ☐ **本人不同意收取由受託人發出的推廣資訊。**
I do not wish to receive marketing information from Trustee.

計劃成員簽署[備註 12]
Signature of the Scheme Member[Note12]

請勿簽署未填妥的表格
Don't sign on incomplete form

日期 Date ☐☐/☐☐/☐☐☐☐ 日/月/年 DD/MM/YYYY

只供本公司填寫 – 強積金中介人資料 FOR OFFICE USE ONLY - MPF Intermediary Details

只適用於理財顧問 / 保險代理公司 **For Agent / Company Agent only**

☐ 本人確認於是次權益轉移中涉及 / 進行受規管活動。 **I confirm that regulated activity is involved / conducted in this benefits transfer.**

如本人：(i) 沒有於以上方格填上剔號；及(ii) 沒有遞交「強積金客戶聲明書」，即代表本人於是次權益轉移中並沒有進行受規管活動。 **If I have not : (i) ticked the box above; and (ii) submitted any "MPF Customer Declaration Form", it shall be regarded as no regulated activity is conducted in this benefits transfer.**

附註 ：若當中涉及 / 進行受規管活動，此申請表格必須跟客戶已簽妥之「強積金客戶聲明書」一併遞交。
NOTE : If regulated activity is involved / conducted, then this request form must be accompanied by a duly signed "MPF Customer Declaration Form".

理財顧問適用 For Agent

理財顧問一 Agent 1

姓
Surname

名
Given name

編號
Code

強積金註冊編號
MPF Card Registration No.

理財顧問二 Agent 2

姓
Surname

名
Given name

編號
Code

強積金註冊編號
MPF Card Registration No.

經紀 / 保險代理公司適用 For Broker / Company Agent

經紀/保險代理公司名稱
Name of Broker/ Company Agent

經紀/保險代理公司編號
Code of Broker/Company

經紀/保險代理公司強積金註冊編號
MPF Card Registration No. of Broker/Company Agent

顧問姓名
Name of Consultant

顧問強積金註冊編號
MPF Card Registration No. of Consultant

填妥本表格後，請把第 1 至 4 頁 (註釋及「僱員自選安排」強積金累算權益(權益)轉移指南無須提交) 交予新計劃的受託人。Please send pages 1 to 4 of this Form (excluding the Explanatory Notes and GUIDE TO TRANSFER OF MPF ACCRUED BENEFITS (BENEFITS) UNDER EMPLOYEE CHOICE ARRANGEMENT (ECA)) to the trustee of New Scheme after completion.

請將填妥表格交予:	**Please send the completed form to**:
永明彩虹強積金計劃行政管理人 — 卓譽金融服務有限公司 香港九龍紅磡德豐街 18 號海濱廣場一座 10 樓	Sun Life Rainbow MPF Scheme, The Administrator, BestServe Financial Limited 10/F, One Harbourfront, 18 Tak Fung Street, Hunghom, Kowloon, Hong Kong
電話： 3183 1888 傳真： 3183 1889 網址： www.sunlife.com.hk	Tel: 3183 1888 Fax: 3183 1889 Website: www.sunlife.com.hk

第五部分 SECTION V 註釋 Explanatory Notes

(1) 如你**沒有**香港身份證，請填上你在護照上的姓名。If you do **NOT** possess a HKID Card, please fill in your name as shown on your passport.

(2) 如你沒有提供原計劃名稱、計劃成員帳戶號碼或僱主識別號碼，或所提供的資料有誤，則此項轉移申請或不獲處理。你可於成員證明書、接納通知、參與通知或周年權益報表獲取有關資料。如有疑問，請聯絡你原計劃的受託人或僱主。有關強積金計劃的名稱，可參閱積金局網站 (www.mpfa.org.hk)。The transfer election may not be processed if the Name of Original Scheme, Scheme Member Account Number or the Employer's Identification Number is not provided or is incorrect. This information can be found in your membership certificate, notice of acceptance, notice of participation or annual benefit statement. If you are in doubt, please contact your trustee of Original Scheme or your employer. Please refer to the MPFA website (www.mpfa.org.hk) for the name of schemes.

(3) 僱主識別號碼即受託人為有關僱主編配的號碼。受託人或會使用不同名稱來設定此號碼 (例如帳戶編號、僱主編號、合約編號、強積金客戶編號、參與計劃編號、計劃編號、附屬計劃編號)。你可查閱受託人發出的報表上或透過受託人提供的成員諮詢服務獲取該號碼。如有疑問，請聯絡你的受託人或僱主。The Employer's Identification Number is the number assigned by the trustee to the employer concerned. Trustees may use different names for this number (e.g. account number, company code, contract number, employer account number, employer code, employer ID, employer number, MPF client number, participating plan number, plan number, scheme number, scheme ID, sub-scheme number). The number can be found in the statements issued by the trustees or through the member enquiry facilities available from trustees. If you are in doubt, please contact your trustee or your employer.

(4) 如你在第三部選擇轉移的權益的任何部分是「零」結餘，則該部分權益的轉移申請將不獲處理。If any part of the benefits chosen under Section III contains nil balance, that part will not be processed.

(5) (a) 這是指《規例》第 78(6)(b)條所提述的分帳戶內的全部權益。This means all benefits in the sub-account referred to in section 78 (6)(b) of the Regulation.

(b) 就行業計劃的臨時僱員而言，這個分帳戶一般包含在以臨時僱員身份受僱於不同僱主期間向這個分帳戶所作出的所有僱員強制性供款所產生的權益。For a casual employee in an industry scheme, this sub-account generally contains the benefits derived from all the employee mandatory contributions made to this sub-account whilst working as a casual employee with different employers.

(6) 如你已於同一公曆年內要求把僱員強制性供款所產生的權益轉出一次 (或如原計劃的管限規則准許你作出多於一次的轉移，但你轉移的次數已達該上限) ，則該部分權益的轉移申請將不獲處理。詳情請參閱《指南》的第(4)段。If you have already elected to transfer out the benefits derived from the employee mandatory contributions once (or, if the governing rules of Original Scheme allow more than once, but the transfer elections you have made have reached the maximum number of times allowed by the governing rules) in the same calendar year, transfer of that part of the benefits will not be processed. Please refer to paragraph (4) of the Guide for more information.

(7) (a) 這是指《規例》第 78(6)(e)條所提述的分帳戶內的全部權益。This means all benefits in the sub-account referred to in section 78 (6)(e) of the Regulation.

(b) 就行業計劃的臨時僱員而言，這個分帳戶一般包含在以臨時僱員身份受僱於不同僱主期間向這個分帳戶所作出的所有僱員自願性供款所產生的權益。For a casual employee in an industry scheme, this sub-account generally contains the benefits derived from all the employee voluntary contributions made to this sub-account whilst working as a casual employee with different employers.

(8) 如你要求把自願性供款所產生的權益轉出，但原計劃的管限規則並不准許轉移，則有關轉移選項將不獲處理。詳情請參閱《指南》的第(3)段。If you request to transfer out the benefits derived from the voluntary contributions but the governing rules of Original Scheme do not allow this, the option(s) will not be processed. Please refer to paragraph (3) of the Guide for more information.

(9) 這是指《規例》第 78(6)(c)條所提述的分帳戶內的全部權益。這部分一般包含可歸因於以往受僱或自僱工作並已轉移至現職供款帳戶的強制性供款所產生的權益。This means all benefits in the sub-account referred to in section 78(6)(c) of the Regulation. This part generally contains benefits derived from the mandatory contributions that are attributable to your former employment(s) or former self-employment (s) and that have been transferred into the contribution account under current employment.

(10) 這是指《規例》第 78(6)(f)條所提述的分帳戶內的全部權益。這部分一般包含可歸因於以往受僱或自僱工作並已轉移至現職供款帳戶的自願性供款所產生的權益。This means all benefits in the sub-account referred to in section 78(6)(f) of the Regulation. This part generally contains benefits derived from the voluntary contributions that are attributable to your former employment(s) or former self-employment (s) and that have been transferred into the contribution account under current employment.

(11) 如你沒有提供新計劃名稱、帳戶類別、僱主識別號碼或計劃成員帳戶號碼，或所提供的資料有誤，則此項轉移申請或不獲處理。你可於成員證明書、接納通知、參與通知或周年權益報表獲取有關資料。不過，如你最近才參加計劃，並未獲悉僱主識別號碼及計劃成員帳戶號碼，則可留空此項。如有疑問，請聯絡你新計劃的受託人。有關強積金計劃的名稱，可參閱積金局網站 (www.mpfa.org.hk) 。 The transfer election may not be processed if the Name of New Scheme, Account Type, Employer's Identification Number or your Scheme Member Account Number is not provided or is incorrect. The information can be found in your membership certificate, notice of acceptance, notice of participation or annual benefit statement. You may, however, leave the Employer's Identification Number and the Scheme Member Account Number blank if you have recently enrolled in the scheme and have not been notified of those numbers. If you are in doubt, please contact your trustee of the New Scheme. Please refer to the MPFA website (www.mpfa.org.hk) for the name of schemes.

(12) 你的簽署必須與你之前給予原計劃的受託人的簽署式樣相同。請注意，若本表格上的簽署與你之前提交予原計劃的受託人的簽署式樣不符，有關轉移或不獲處理。如有疑問，請聯絡你原計劃的受託人。 The signature must be the same as your specimen signature previously submitted to your trustee of Original Scheme. Please note that the transfer may not be processed if the signature provided in this Form does not match with the specimen signature previously given to your trustee of Original Scheme. If you are in doubt, please contact your trustee of Original Scheme.

第六部分 Section VI	「僱員自選安排」強積金累算權益(權益)轉移指南 **GUIDE TO TRANSFER OF MPF ACCRUED BENEFITS (BENEFITS) UNDER EMPLOYEE CHOICE ARRANGEMENT (ECA)** *《強制性公積金計劃(一般)規例》(第 485A 章)第 148A 及 148B 條* *Sections 148A and 148B of the Mandatory Provident Fund Schemes (General) Regulation (Cap 485A)*

第 MPF(S)-P(P)號表格、註釋及本《指南》的用詞解釋 ： Explanation of terms used in Form MPF(S)-P(P), the Explanatory Notes and this Guide:

(a) 「供款帳戶」—與《規例》第 2 條所載的供款帳戶具有相同含義。一般是指強積金計劃下主要用以接收僱主為僱員所作出以及代表僱員所作出的強積金供款 (包括僱主及僱員部分) 的帳戶。供款帳戶亦包括自僱人士在新計劃下主要用以接收其在自僱期間所作出的強積金供款的帳戶。"Contribution account" – has the same meaning as in section 2 of the Regulation. Generally, it is an account in an MPF scheme which is mainly used to receive MPF contributions (both employer and employee portions) made by an employer for an employee and on behalf of the employee. Contribution account may also include an account of a self-employed person in New Scheme which is mainly used to receive MPF contributions made by himself while self-employed.

(b) 「個人帳戶」—與《規例》第 2 條所載的個人帳戶具有相同含義。一般是指強積金計劃下主要用以接收由另一帳戶轉入的權益的帳戶(不包括供款帳戶)。 "Personal account" – has the same meaning as in section 2 of the Regulation. Generally, it is an account (other than a contribution account) in an MPF scheme which is mainly used to receive the benefits transferred from other account(s).

(c) 「原計劃」—指轉出你的權益的強積金計劃。"Original Scheme" – the MPF scheme from which your benefits are to be transferred.

(d) 「新計劃」—指轉入你的權益的強積金計劃。如你選擇把權益轉移至同一強積金計劃內的另一個帳戶，則本表格所述的新計劃將與原計劃相同。"New Scheme" – the MPF scheme to which your benefits are to be transferred. If you elect to transfer your benefits to another account within the same MPF scheme, New Scheme on this Form will be the same as Original Scheme.

(e) 「公曆年」— 指由 1 月 1 日至 12 月 31 日的一年期間。 "Calendar year" – the one-year period from 1 January to 31 December.

僱員在「僱員自選安排」下可享的權利 Rights of employees under the ECA

(1) 在「僱員自選安排」下，僱員可在**受僱期間**，選擇把原計劃供款帳戶內的部分權益轉移至其自選新計劃的帳戶。Under the ECA, an employee can, **during employment**, make an election to transfer part of the benefits from a contribution account in Original Scheme to an account in New Scheme nominated by him.

(2) 下表載列供款帳戶內由強制性供款所產生的各部分權益，以及這些權益在「僱員自選安排」下可作轉移的情況： The table below shows the parts of benefits derived from the mandatory contributions in a contribution account and the transferability of these parts of benefits in a contribution account under the ECA:

供款帳戶內的各部分權益 **Parts of benefits in a contribution account**		在「僱員自選安排」下累算權益可作轉移的情況 **Under ECA**
(a)	現職期間的僱主強制性供款 Employer mandatory contributions in current employment	不可轉移 Not transferable
(b)	現職期間的僱員強制性供款 Employee mandatory contributions in current employment	可**每公曆年一次**[1]轉出至強積金個人帳戶 Transferable to an MPF personal account **once per calendar year**[1]
(c)	以往工作所累積並已轉移至供款帳戶的強制性供款 Mandatory contributions that have been transferred into the contribution account and are attributable to former employment(s)	可隨時轉出至強積金個人帳戶或供款帳戶 Transferable to an MPF personal account or contribution account anytime

(3) 至於自願性供款所產生的權益是否可作轉移，則視乎原計劃的管限規則而定。有關規則的詳情，請查閱原計劃的要約文件。該文件可於原計劃受託人的網站下載，你也可向僱主或原計劃的受託人查詢詳情。The transferability of benefits derived from voluntary contributions is subject to the governing rules of Original Scheme. Please check this information from the offering documents of Original Scheme, which can be found on the website of the trustee of Original Scheme. You may also consult your employer or contact the trustee of Original Scheme.

(4) 你在每個公曆年內只可選擇轉出僱員強制性供款所產生的權益一次 (如原計劃的管限規則訂明可多次轉移權益，則不在此限) 。**新計劃的受託人收到已填妥的轉移選擇表格的日期將用作計算轉移次數有否超出限額。**你可於原計劃的受託人向你發出的轉移結算書上查閱該日期，或直接向原計劃的受託人查詢。You can only elect to transfer out the benefits derived from your employee mandatory contributions once per calendar year (unless the governing rules of Original Scheme provide for more frequent transfer-out). **The date the trustee of New Scheme receives the completed election form is adopted for counting that quota.** You may check that date from the transfer statement issued by your trustee of Original Scheme, or consult your trustee of Original Scheme directly.

(5) 請注意，你在現職期間所作出的僱員強制性供款及僱員自願性供款 (如有) 所產生的權益只可轉移至**個人帳戶**，不可轉移至其他供款帳戶 (註：如你同時從事多於一份受僱工作，則會持有其他供款帳戶) 。Please note that the benefits derived from your employee mandatory contributions in current employment and employee voluntary contributions in current employment (if any) can be transferred to a **personal account** only. They cannot be transferred to another contribution account (Note: if you are concurrently working for more than one employer, you would have other contribution accounts).

(6) 從原計劃轉出你的權益後，現職僱主日後為你作出的供款(包括僱主及僱員部分)，將繼續由受託人分配至你在原計劃的供款帳戶。如你日後想把該等僱員強制性供款所產生的權益轉移至你在新計劃的帳戶，便須在下一個公曆年另行作出轉移選擇 (如原計劃的管限規則訂明可在同一公曆年內多次轉出權益，則可提前在同一公曆年內選擇轉出權益) 。After your benefits are transferred out from Original Scheme, future contributions made by your existing employer (both employer and employee portions) will continue to be made to your contribution account with the trustee of Original Scheme. If you want to transfer the benefits derived from the subsequent employee mandatory contributions to your account in New Scheme, you should make a separate transfer election in the next calendar year (or earlier if the governing rules of Original Scheme allow for more frequent transfer-out in a calendar year).

1. 如原計劃的管限規則訂明可多次轉移權益，則不在此限。
1. Unless the governing rules of Original Scheme provide for more frequent transfer-out.

選擇作出轉移前的注意事項 Reminders before making an election to transfer

(7) 在你決定把權益轉移至另一計劃前，你應考慮以下因素： Before you decide to transfer your benefits to another scheme, you should take into consideration the following factors:

(a) 受託人的服務 (例如向計劃成員發出權益報表的頻密程度及每年可免費轉換基金的次數) ； services of the trustees (e.g. frequency of issuance of benefit statement to scheme members; number of free fund switching per year);

(b) 基金的收費 (詳情請參閱積金局網站的收費比較平台，或可於積金局各辦事處免費索取《強積金基金收費比較平台摘要》) ；fees and charges of the funds (for detailed information, please refer to the Fee Comparative Platform on the website of the MPFA or the Summary of Fee Comparative Platform on MPF Funds which can be obtained from the offices of the MPFA free of charge);

(c) 計劃所提供的基金選擇範圍，尤須注意計劃有否提供切合你需要的基金選擇；及 the range of fund choices offered by the schemes and in particular whether there are funds available that match what you need; and

(d) 如你現時投資於強積金保證基金，則從該保證基金轉出權益可能導致你不符合部分或所有保證條件，從而影響你享有保證的資格。有關詳情請查閱原計劃的要約文件或向原計劃的受託人查詢。 if you are currently investing in an MPF guaranteed fund, a transfer of the benefits out of that guaranteed fund may result in some or all of the guarantee conditions not being satisfied; thus affecting your entitlement to the guarantee. Please check the offering document of Original Scheme or consult the trustee of Original Scheme for details.

(8) 在決定把權益轉移至新計劃前，你應盡量瞭解新計劃的內容。有關新計劃的詳情，請查閱新計劃的要約文件。該文件可於新計劃的受託人的網站下載，你也可聯絡新計劃的受託人查詢詳情。Before deciding to transfer benefits to New Scheme, you should try to understand as much as you can about New Scheme. Please check the information about New Scheme from the offering document of New Scheme, which can be found on the website of the trustee of New Scheme or contact the trustee of New Scheme.

(9) 請確保你在新計劃下已持有強積金帳戶。否則，你在提交本表格之時或在此之前，須先行向新計劃的受託人提交成員參加計劃表格。有關開立帳戶的程序及所需文件，請向新計劃的受託人查詢。Please ensure that you have an MPF account in New Scheme. Otherwise, you have to submit a membership enrolment form before or at the same time you submit this Form to the trustee of New Scheme. Please consult your trustee of New Scheme for the procedures and required documents for setting up an account.

(10) 如欲把權益從一個強積金計劃轉移至另一個強積金計劃，請留意轉入帳戶的權益將會如何投資。一般而言，如你(a)沒有或尚未就有關帳戶向新計劃的受託人給予任何投資指示；或(b)已就有關帳戶給予投資指示，要求把權益按照預設投資策略投資，則轉入該帳戶的權益將按照預設投資策略投資。如有需要，請向新計劃的受託人查詢詳情。如欲就新計劃的帳戶更改或給予投資指示，亦請聯絡新計劃的受託人。If you wish to transfer your benefits from an MPF scheme to another, please be aware of how the transferred-in benefits will be invested. In general, the transferred-in benefits will be invested according to the default investment strategy ("DIS") if you either (a) do not give or have not given any investment instructions for the account to the trustee of New scheme or (b) have given investment instructions for the account to invest benefits according to the DIS. Please approach the trustee of New Scheme to seek clarification, where necessary. If you wish to change or specify an investment instruction for the account in New Scheme, please also approach the trustee of New Scheme.

(11) 如你已年滿或快將年滿 50 歲，而現時你的權益是按照計劃的預設投資策略投資，請留意預設投資策略的降低投資風險機制，會由計劃成員年滿 50 歲開始運作。如計劃的受託人在預設投資策略下按年降低你的投資風險的時間，與接獲你的轉移權益申請的時間相當接近，該計劃的受託人將根據其運作程序及在符合《強制性公積金計劃條例》規定的情況下，訂定處理降低風險及轉移權益的次序。如欲瞭解受託人如何處理該等交易，請向相關受託人查詢詳情。If you have reached, or are approaching, the age of 50 and your benefits are currently invested according to the DIS of the scheme, you should be aware that the de-risking mechanism of the DIS starts at the age of 50. If the annual de-risking of your investment in the DIS and your transfer request take place at around the same time, the trustee of the scheme shall sequence the de-risking and the transfer request in accordance with its procedures and in compliance with the Mandatory Provident Fund Schemes Ordinance. Please consult the relevant trustee(s) if you wish to know the details of how the trustee(s) will handle these transactions.

(12) 為免被第三者填上不正確的資料，**請勿在空白的表格上簽署**。在新計劃的受託人收到已填妥的選擇表格後，之前由受託人採取的行政步驟未必能夠撤銷。In order to prevent a third party from filling in incorrect information, please **DO NOT sign on a blank form**. After the completed election form has been received by the trustee of New Scheme, the administration procedures taken by the trustees may not be reversible.

(13) 在你作出轉移選擇當日，你現有強積金帳戶顯示的基金單位數目，或會與贖回基金單位當日的數目有所不同。原計劃的受託人將在贖回日贖回你選擇從強積金帳戶轉出的各部分權益的所有基金單位，以及轉出贖回權益。新計劃的受託人會按照你的指示買入基金單位，過程中會出現一至兩個星期的「投資空檔」。在此期間，你的強積金權益不會投資於任何基金，假若這時基金價格因市場波動而出現變化，有機會出現「低賣高買」的風險。The number of fund units shown in your current MPF account on the date you elect to transfer may be different from that as of the date on which the fund units are redeemed. The trustee of Original Scheme will redeem all the fund units from the part(s) of benefits in your MPF account that you elect to transfer out on the date of redemption and transfer out the redeemed benefits. The trustee of New Scheme will subscribe fund units in accordance with your instructions. There will be a time-lag of about one to two weeks, during which your MPF benefits will not be invested in any fund. During this period, fund prices may change due to market fluctuations, and there is a risk of a "sell low, buy high" scenario occurring.

(14) 有關選擇計劃時各項考慮因素及強積金投資的潛在風險，請參閱積金局網站 (www.mpfa.org.hk) 的相關宣傳刊物。Please refer to the MPFA's publication available from the MPFA website (www.mpfa.org.hk) for the factors to consider when choosing a scheme and the potential risks involved in MPF investment.

查詢 Enquiries

(15) 強積金計劃的要約文件載有該計劃的資料，這些資料將有助你決定是否把權益轉移至該計劃。如欲查詢帳戶詳情及個別強積金計劃或基金的資料，請聯絡有關計劃的受託人。Information about an MPF scheme is set out in the offering document of that scheme. This information will assist you in making a decision about whether to make a transfer of benefits to that scheme. Please contact the relevant trustees for enquiries about account details and information on specific MPF schemes or funds.

(16) 有關「僱員自選安排」的一般查詢，可聯絡有關計劃受託人或積金局 (電郵地址： mpfa@mpfa.org.hk 或積金局熱線電話： 2918 0102)。For general enquiries regarding the ECA, you may contact the relevant trustees or the MPFA (email: mpfa@mpfa.org.hk or MPFA hotline: 2918 0102).

Sun Life
永明金融

個人資料收集聲明
PERSONAL INFORMATION COLLECTION STATEMENT

申請人／成員明白及同意永明信託有限公司(「受託人」)可以將其所收集的任何個人資料(不論由此申請表所收集或由其他途徑取得)作以下用途:(i)處理成員的此項申請及任何其他申請；(ii)為申請人／成員參與本計劃；(iii)管理成員於本計劃的供款和累算權益的事宜；(iv)進行客戶調查；(v)為客戶研究及設計金融、保險或退休金產品；(vi)為申請人／成員甄選及參與獎賞、忠實或特選客戶計劃；(vii)因上述目的與成員聯絡；(viii)與上述目的直接有關的任何其他目的；及(ix)為遵守適用的法例、法規或法庭命令。

受託人亦可使用申請人／成員的聯絡資料，基本個人資料投資選擇及累算權益，就本計劃的產品的推廣資訊，以包括電話、郵件、電郵、電話短訊或任何電子信息等方法聯絡申請人／成員。除非得到申請人／成員同意(包括表示不反對)，否則受託人不可使用申請人／成員資料為該用途。若申請人／成員不同意接受此等推廣資訊，可於表格的聲明和授權部份適當位置填上剔號。

受託人可為以上目的披露申請人／成員的個人資料予(a)為協助受託人就上述用途(不論在香港或其他地方)而提供服務的第三方，包括計劃管理人(條件是有關承辦商須把所有個人資料保密並只會為提供有關服務而使用個人資料)；(b)申請人／成員的銀行作繳款用途；(c)申請人／成員的保險經紀(如有)；(d)申請人／成員的強積金中介人；(e)受託人的關連公司(根據公司條例訂明)包括保險公司及金融服務機構；(f)受託人及其關連公司(不論在香港與否)為遵守監管當局或其他機構發出之指引或其就法例、法規或法庭頒令所約束或規定之責任而需向其作出披露的任何人士；(g)有關僱主；及(h)按法例要求或准許的其他人仕。

受託人可就法例准許或於獲得申請人／成員的同意後披露或將申請人／成員的個人資料作其他用途。

申請人／成員明白申請人／成員所提供之個人資料均屬自願，然而倘若未能提供所需個人資料，可導致受託人無法處理申請人／成員的申請。申請人／成員有權查閱及要求更正受託人持有有關成員的個人資料，有關要求可以書面形式郵寄至香港九龍紅磡德豐街 18 號海濱廣場一座 10 樓卓譽金融服務有限公司退休金管理部經理。受託人可就處理任何該等要求收取合理費用。

Applicant/Member(s) understand(s) and consent(s) that, any personal data collected by Sun Life Trustee Company Limited (“Trustee”) (whether collected in this application form or otherwise) may be used by the Trustee for the following purposes: (i) processing this application and any other applications applicant/member(s) make(s); (ii) enrolling applicant/member(s) in the Scheme; (iii) administering and managing applicant/member(s)’ contributions and accrued benefits under the Scheme; (iv) conducting customer surveys; (v) researching and designing financial, insurance or pensions products for customer use; (vi) selecting and participating in reward, loyalty or privileges program and related service for applicant/member(s); (vii) contacting applicant/member(s) for the above purposes; (viii) purposes which are directly related to the above purposes; and (ix) complying with applicable laws, regulation or court order.

The Trustee may also use applicant/member(s)’ contact details, demographic information, investment choices and accrued benefits to contact applicant/member(s) with marketing information regarding the Scheme, including by phone calls, mail, email, SMS or any type of electronic message. The Trustee may not so use applicant/member(s)’ data unless the Trustee have received applicant/member(s)’ consent (which includes an indication of no objection). Tick the box in appropriate area under the Declaration and Authorization in the form if member(s) do(es) not consent to receive such marketing information.

The Trustee may disclose member(s)’ personal data for the above purposes : (a) to third parties who provide services in Hong Kong or elsewhere which assist the Trustee to carry out the above purposes, including scheme administrator (provided that such contractors are required to keep all such personal data confidential and may only use the personal data to provide those services); (b) to applicant/member(s)’ bank for payment purposes; (c) to applicant/member(s)’ insurance broker (if any); (d) to applicant/member(s)’ MPF intermediaries; (e) to the Trustee’s related companies (as defined in the Companies Ordinance) including insurance companies and financial services companies; (f) to any person to whom the Trustee or it's related companies (inside or outside Hong Kong) is under an obligation to make disclosure under the requirements of any law, regulation or court order binding on or applying to or to which the Trustee or its related companies (inside or outside Hong Kong) is subject to, or under and for the purposes of any guidelines issued by regulatory or other authorities with which the Trustee or its related companies (inside or outside Hong Kong) is expected to comply; (g) relevant employer(s) and (h) as otherwise required or permitted by law.

The Trustee may also use and disclose member(s)’ personal data in other ways with applicant/member(s)’ consent or as otherwise required or permitted by law.

Applicant/Member(s) understand(s) that the information applicant/member(s) gave is voluntary, but failure to provide the requested personal data may mean the Trustee is unable to process applicant/member(s)’ application. Applicant/Member(s) has/have the right to seek access to and request correction of any personal data the Trustee holds by sending a written request to The Manager, Pensions Administration Department, BestServe Financial Limited, 10/F, One HarbourFront, 18 Tak Fung Street, Hung Hom, Hong Kong. The Trustee may charge a reasonable fee for the processing of any such requests.